It's nice when the savings are sustainable, too.

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Letter from the CEO

4 The Intelligence Collective
Doreen Murner, CEO, NAEP
As a community, we already have the answers, and NAEP helps to ensure that all that wisdom and experience is available to all.

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8 Renewable Energy Solutions Without Breaking the Bank – The UC San Diego Story
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As sustainability continues to grow in importance on our campuses, the partnerships among Procurement, Physical Plant, Campus Planning, and other institutional areas need to be strong and functional. The accomplishments at the University of California – San Diego are many and worthy of considering for implementation on your campus. They need not be cost-prohibitive.

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For more information on any of our programs or to register, go to www.NAEPnet.org.

**Procurement Academies**

**Tier I, Foundation:** Hosted by University of Colorado

February 2-4, 2009

The Westin Tabor Center, Denver Colo.

This session is currently full, but registrations for a waiting list are being accepted.

**88th Annual Meeting**

April 19-22, 2009

Providence, R.I.

Providence Convention Center

Registration is now open to all NAEP Members, Non-Members and Exhibitors.

Keynote Speakers

[Images of speakers]

On-Demand Learning

Be sure to check the Pro-D menu on our website at www.NAEPnet.org frequently for new webcasts, podcasts, and other on-demand learning options!

Watch the Web site for the announcement of dates for these academies as well!

Foundation: Second offering – TBD

Professional: TBD

Sr. Professional: TBD

**Regional Meeting Schedule**

<table>
<thead>
<tr>
<th>REGION</th>
<th>MEETING DATE</th>
<th>CITY/STATE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Florida</td>
<td>March 18-20</td>
<td>Daytona Beach, FL</td>
</tr>
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The Intelligence Collective is Not Only Upon Us – it IS Us

The answers to all questions reside inside each of us. Lofty but true. And here’s how I know.

We recently fielded a salary survey for professionals in procurement, so that our Members (and anyone else who is interested) can benchmark salaries by a variety of criteria – school size, years in the profession, by state, and so on. This study and the awesome insights it offers into state procurement as a career choice is possible because of the 600+ Members that took the time to respond to the study. This supports my theory – that alone we each possess a part of the answer, and together we can deliver the detailed insights into everything from best practices to salary benchmarking to process improvements. It’s all in the collective, waiting to be tapped. Maximizing collective intelligence relies on the ability of an organization to accept and develop any potentially useful input from any Member. NAEP has proven over and over just how powerful a collective we are, and how effectively we collaborate, share and disseminate our collective intelligence in actionable ways.

Our annual meeting is a great example of collective intelligence brought together for the good of every attendee. Knowledge from all over is pulled together to support the entire community in brainstorming solutions to challenges and in sharing best practices and cutting-edge strategies to revitalize procurement at every institution, public or private, large or small.

Cooperative purchasing is another form of an Intelligence Collective, one with very visible results. E&I, the cooperative purchasing organization and NAEP’s sister organization, offers competitively bid contracts that are a result of our Membership forming RFP teams and executing a bid. Collective Intelligence in action.

There are many group purchasing organizations that rely on the collective intelligence of their market to ensure that they deliver exactly what is needed, in the way it is needed.

“We wish to improve ourselves. We will add your biological and technological distinctiveness to our own.”

Star Trek’s “The Borg”

So I guess that resistance is futile, just like those pesky Borg creatures on Star Trek tell us, however for entirely different reasons. You should be assimilated into the NAEP collective so you can reap all of the dynamic, cost-effective benefits, and unlike Star Trek’s Borg, you don’t need to sacrifice individuality or compromise on needs that are unique to you and your institution. At a time when our economy is forcing budgets to be cut, travel to be suspended and your opportunities to make connections with your peers become few and far between, your schools Membership in NAEP opens up an entire COLLECTIVE of intelligence that can tap in a variety of ways – online, listserv and face-to-face. Your Membership also delivers access to important research like our new salary study. The Collective is good, the Collective is smart and the Collective for procurement in higher education is NAEP.

For more information about the NAEP 2008 Salary Study or any other NAEP Research, please visit our website at NAEPnet.org. All of our research can be found under the Publications tab.

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Applicants Wanted:
Purchasing People That Need Professional Development —
Inquire Within

by Cory Harms
Iowa State University

There are several reasons that people don’t apply for scholarships, whether generally or for professional organizations like ours (NAEP) relative to attending meetings, institutes, etc. And that is probably why our national and regional leadership keep finding themselves with a lack of applicants. I have seen some years in the MINK (Missouri, Iowa, Nebraska, Kansas) region in which we had three scholarships and only two applicants. This seems especially perplexing when funding issues are more prevalent today than ever. I recall hearing many Members say they had to choose between a regional event and the National meeting because of funding, yet here we are with scholarships that only a handful of Members apply for.

What could some of these stumbling blocks be? Perhaps the individual may not feel qualified, that he/she may come from too big a school, that the person may simply be unaware of the opportunity, that he/she doesn’t have the time to apply, perhaps that the person isn’t confident about writing a good application, that he/she may be too embarrassed to ask or that the individual doesn’t feel deserving.

Let’s take these on one at a time.

“I’m not qualified.”

Every Member in our organization is qualified for some type of scholarship. There are scholarships for new attendees, regional scholarships and national scholarships, not to mention that some of our own universities provide professional development grants.

“I come from too big a school.”

Large organizations may have bigger budgets, but they also have more folks to try to develop. They have just as much need as small schools for scholarships.

“I didn’t know the scholarships were out there.”

Well now you do, and it’s time to do something about it. Check with your region and your school and go to www1.naepnet.org/tools/scholarships.htm and check out some of the scholarship opportunities.

“I don’t have time to apply.”

I tested this myself, and it only takes about 15 minutes. Scholarships range from $500 to $1,000. That is the equivalent of $2,000 to $4,000 an hour. Good return if you can get it.

“I don’t think I can write a good application.”

Most applications are short and to the point. Just describe the reason for your request, what you think you will get out of the event and why the additional funding would be helpful.

“I’m embarrassed to ask.”

Get over it. The risk is worth the reward, and people are happy to help!

“I’m not sure if I deserve it.”

If you really want to attend the event and feel you can get something out of it, then you deserve to apply. Thinking about it another way, maybe your scholarship will allow someone else in your department to go to another event because you saved funds internally.

As I did my own research on applying, I easily found the different opportunities and popped out a few applications. It was fast and easy, and any dollar amount will help me get to my next conference...and even though I really want the scholarships, I encourage you to do the same. You may not get everything you apply for, but it is certain that if you don’t apply, you will get nothing.

The money is out there. Someone is going to get it. Shouldn’t it be you?

Cory Harms is the associate director of Purchasing at Iowa State University. He is President of the MINK (Missouri, Iowa, Nebraska, and Kansas) Region and serves on the NAEP Editorial Board. He has presented at both regional and national NAEP meetings and has spoken for the Missouri Association of Public Purchasing (MAPP).

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The University of California San Diego (UC San Diego) is a research-intensive institution with an 11M sq-ft facility footprint that includes two hospitals, a supercomputer center and research laboratories. With the invention of the Keeling Curve in 1958 measuring the level of carbon dioxide in the atmosphere, UC San Diego has been a pioneer in climate change science and research. UC San Diego has implemented a multifaceted approach to achieve world-class sustainable energy infrastructure. This article describes a few of the more impressive measures deployed over the past few years.

As a publically funded university experiencing unprecedented cuts to the utilities and operating budgets, UC San Diego not only needs to reduce its carbon footprint but also must do so in a cost-effective manner.

**Cogeneration**

UC San Diego’s 30MW Cogeneration Facility supplies approximately 80% of the campus’ electricity. Cogeneration uses natural gas to produce electricity and heat energy. The facility uses state-of-the-art gas turbines equipped with pollution controls that are 45–50% more efficient than conventional natural gas power plants and produce 75% less emissions. Cogeneration saves approximately $8 million per year in purchased utility costs and reduces: (1) energy loss due to transmission and distribution of electricity over the statewide utility grid; (2) reliance on out-of-state coal-burning power generation; and (3) congestion on the grid.

Thermodynamic efficiencies associated with generating power and recovering the waste heat for campus heating and cooling needs are 20%-35% compared to conventional methods (importing electricity from the grid and burning natural gas in boilers). The cost per kwh will depend on the price for natural gas, but the savings relative to grid power should be consistently 2–4 cents per kwh.

**Solar Photovoltaic Power**

UC San Diego is completing the installation of a 1 megawatt photovoltaic system. Installing solar panels on campus rooftops and parking structures is heavily dependent on state and federal subsidies to make the investment competitive. Without the incentives, unit costs are in the 20–25 cent per kwh range over the system's 20-year useful life. Incentives can bring the costs down to 12–16 cents per kwh, which is what the campus pays for peak electricity.

UC San Diego has entered into a Power Purchase Agreement to pay a 20-year fixed cost for the electricity produced. Because incentives are currently capped at 1 MW, it is cost prohibitive to install more solar panels.
Without Breaking the Bank –

The UC San Diego Story

by John C. Dillott

University of California San Diego

Fuel Cell
UC San Diego has signed a Power Purchase Agreement for a 2.8 MW fuel cell power plant fueled by methane gas from a local wastewater treatment facility. Digester methane will be purified and trucked to campus to power the fuel cell and a waste heat recovery system. The cost per kwh is 13 cents, comparable to grid power. Waste heat from the fuel cell can be used for campus heating or cooling needs, a benefit that is worth approximately 1–2 cents per kwh.

Fuel Cells that use pipeline natural gas are not considered renewable energy. Fuel Cells do produce power with less pollution emissions, but unless a renewable source of biogas is used, a fuel cell will be more expensive than a gas turbine power plant. Because the fuel cell operates all day every day, it produces 10 times the amount of energy produced by a similar size solar panel system.

Imported Electricity
UC San Diego purchases electricity from a third-party provider; through a legacy contract that dates back to when the California electricity market was deregulated. UC San Diego “greens up” this electricity supply by purchasing Renewable Energy Credits (RECs) for 20% of the volumes. The premium UC San Diego pays for this energy adds about 0.15 cents per kwh to the unit cost. The benefit of being able to claim renewable energy usage without an upfront capital cost of an alternative energy project is desirable. However, a regulated market for RECs does not exist at the moment, and some greenhouse gas accounting mechanisms do not allow RECs to be counted since the physical energy is not being delivered.

Sea Water Air Conditioning
UC San Diego is investigating the possibility of offshore sea water use for campus cooling. The sea water air conditioning concept involves pumping cold sea water from the La Jolla Canyon, a deep trench about 1 mile off the Scripps Institution of Oceanography (part of the UC San Diego campus) shoreline. Cold sea water flows through a shore-based cooling station where a heat exchanger cools water used for campus air conditioning. This project could: (1) offset up to 4 MW of energy currently used to power the campus cooling system; (2) save the campus over $4 million in annual energy costs; and (3) reduce campus cooling tower fresh water use by more than 100 million gallons annually. UC San Diego is undertaking a feasibility study to determine whether this project is technically, fiscally and environmentally feasible.

Wind
UC San Diego is currently working with system operators and wind producers to devise a plan for integrating wind-generated energy into the campus’ energy management strategy. The campus is seeking to purchase off-peak wind power to reduce its natural gas-powered turbine use by up to 11% (3 MW). Installation of wind turbines on the UC San Diego campus is not feasible due to the wind speeds and height requirements of the wind turbines. Accordingly, UC San Diego is partnering with local wind farms to purchase their excess wind energy. UC San Diego will likely purchase wind energy at rates below campus generation costs and far below peak energy rates. Accordingly, the purchased wind energy allows the UC San Diego to supplement its use of renewable energy resources, maintain campus grid reliability and further reduce purchased utility costs.
UC San Diego is committed to reducing its carbon footprint through energy-efficient operations and development of renewable energy sources that can be adopted regionally and globally. With a vigilant eye towards not only protecting our environment but also our precious dollars, UC San Diego has achieved a balance by choosing projects with the most return on investment, both in terms of reducing carbon emissions and in terms of lowering or at least mirroring the cost that would be paid to purchase electricity from non-renewable resources.

Each initiative is carried out by strong collaboration between many campus administrative, operational and academic units, which fortunately includes a representative from Procurement & Contracts. Strategically, our procurement professionals must be an integral part of these major initiatives to support the unique and complex contract and business issues.

Megawatt = 1,000 kilowatts = 1,000,000 watts — 1 Megawatt is the instantaneous energy demand that could power roughly 800 homes.

Kilowatt hour — the consumption of 1 kilowatt of energy in one hour. A typical home uses approximately 7,000 kilowatt hours in one year.

A Fuel Cell is a device that uses hydrogen and oxygen to create electricity by an electrochemical process using an electrolyte sandwiched between two thin electrodes.

John C. Dillio, is the manager of Energy and Utilities UC San Diego. In this role he is responsible for all energy and utility programs including the 30MW cogeneration plant, chilled and high temp water systems, campus wide energy management control systems, purchased utilities, energy efficiency programs, emerging technologies in energy, and renewable energy. John has 15 years experience in steam and power plant operations, Facilities Design and Construction and Utilities/Energy Management. John holds a Bachelor of Science Degree in Marine Engineering Systems from the US Merchant Marine Academy, Kings Point NY, a Coast Guard Engineering License, is a registered Professional Engineer and Mechanical LEEDs Accredited Professional.
Let's Talk About the **Time Value of Money** — Part 2

by Burr Millsap, CPA, M.B.A.

*University of Oklahoma*

(This is the second in a series of articles on the Time Value of Money and its importance to the Purchasing profession.)

In the previous and first article (Fall 2008 issue) in this series, we talked generally about time value of money (TVM), its purpose, its basic structure and the pieces that are typically used in TVM problems. Importantly, we teed-up this follow-on discussion by agreeing to tackle first the hardest type of TVM problem: the Present Value of an Annuity (PVA).

As a short review, we agreed that the label “Present Value of an Annuity” is probably not the most helpful one, even though it is widely used in business. For learning-aid purposes we agreed – at least for the moment – to use our own label: “Starting-Out Amount.” Our main reason for doing so was that many PVA problems yield answers that are in fact in the future. Therefore, the word “Present” can be confusing to the initial learner. After we get comfortable with the discussion, we can return to using “Present.”

We learned that a “Starting-Out Amount” situation (Figure 1) looks like this...

![Figure 1](image)

...so that the Starting-Out Amount is the value we want to find. By having that amount in an account that pays “i” interest, compounded periodically, we could return to that account at the end of every month for “n” months and draw out a payment (“pmt”) of “$X.”

For example, let’s assume that you will retire at age 60, die at age 85, estimate the need for $4,000 a month after taxes to live well and will use an account that pays 4%, compounded monthly, from which to draw your monthly need. The question is: What amount will you need to have saved up in that account (the Starting-Out Amount) so that it will fund your retirement need?

First, let’s talk about “compounding.” Compounding is the earning of interest upon interest and how frequently that computation is performed. Typical compounding frequencies are daily, monthly, quarterly, semi-annually and annually. Most savings accounts have monthly compounding. In the example below (Table 1) we’re assuming an annual rate of 4%, compounded monthly.

Now, back to our problem. We learned that TVM problems are generally 4-variable problems and that by knowing (or sometimes assuming or developing) any 3 variables we can solve the 4th. Here is what we know (or assume) for your retirement question:

1. \( i = 4\% \), compounded monthly \( \left( 0.33\% \text{ each month} \right) \)
2. \( n = 300 \) (85 – 60 = 25 years X 12 = 300 months)
3. \( pmt = \$6,154 \) (your needed before-tax amount assuming a federal income tax rate of 28% and a state income rate of 7% \( \left( \$4,000 \div 11 - 0.35 \right) \) )

<table>
<thead>
<tr>
<th>Table 1</th>
<th>Month 1</th>
<th>Month 2</th>
<th>Month 3</th>
<th>Month 4</th>
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<tbody>
<tr>
<td>Beginning balance</td>
<td>$1,000.00</td>
<td>$1,003.33</td>
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<td>$1,010.03</td>
</tr>
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<td>Annual rate</td>
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<td>4.00%</td>
<td>4.00%</td>
<td>4.00%</td>
</tr>
<tr>
<td>Monthly rate (annual rate / 12)</td>
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<td>0.33%</td>
<td>0.33%</td>
<td>0.33%</td>
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<tr>
<td>Interest earned (beginning balance x monthly rate)</td>
<td>$3.33</td>
<td>$3.34</td>
<td>$3.36</td>
<td>$3.37</td>
</tr>
<tr>
<td>Ending balance</td>
<td>$1,003.33</td>
<td>$1,006.68</td>
<td>$1,010.03</td>
<td>$1,013.40</td>
</tr>
</tbody>
</table>

12 EDUCATIONAL PROCUREMENT JOURNAL Winter 2008-2009
Let's open an Excel spreadsheet (Figure 2) to work out the solution. First, let's set up the three "knowns" in the exhibit below.

Having done that, our cursor, in this example, now needs to be in cell D5, the solution cell. Let's then click on Excel's Function Wizard (fx) to find our 4th variable, the Starting-Out Amount of this annuity situation. (Remember, "annuity" is simply a periodic payment.) This dialog box (Figure 3) will appear.
The next dialog box will appear as shown in Figure 4.

Click in the “Rate” white space in the box, and then click on the monthly rate cell (D2 in this example).

Then click in the “Nper” white space in the box, (Figure 5) followed by a click on the number-of-months cell (D3 in this example).

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Then click in the “Pmt” white space in the box (Figure 6), type in a minus sign, followed by a click on the monthly-payment-needed cell (D4 in this example). Finally, click on “OK.”

(Without the minus sign, Excel will still give us the correct answer, but with a minus sign in front of it. The explanation for why it works that way is a little too long for our purposes here. Just think of it as a toggle switch. Typing in the minus sign as instructed above keeps it out of the answer; not typing it in allows it to show up in front of the answer. Either way, it’s the absolute value of the answer we’re interested in, and either way, that value will be the same.)

In the solution cell (Figure 7, D5 in this example), Excel returns the value of $1,165,891. Notice also, that in the formula area, Excel indicates the formula for that cell.

There’s your number!

If you retire at age 60, die at age 86, can find an account during your retirement that will pay an annual rate of 4%, compounded monthly, and need $4,000 a month — after taxes — to live on...your Starting-Out Amount in that account (the Present Value...yes, that’s what it’s called even though we’re talking about the future) will need to be $1,165,891. That Starting-Out Amount – that Present Value – will allow you to make a withdrawal of $6,154 each month. From that you should be able to set aside what you’ll need for your federal and state income taxes and live comfortably on what’s left ($4,000). So, what’s the lesson here? Make sure you die on schedule...Just kidding.

In the next article, we’ll explore other uses of the Present-Value-of-Annuity type TVM problems.
Learning to Share Responsibly: Best Purchasing Practices in Higher Education

by Scott Wilson
U.S. Communities, Program Manager

When it comes to responsible purchasing, institutions that collaborate are getting ahead of the pack.

These universities and colleges are saving valuable time and money and are sharing the best ways to implement sustainable purchasing programs. The secret to this success is cooperation.

The Cooperative Advantage
For most universities and colleges, time is precious. Jan West, purchasing specialist at Madison Area Technical College (MATC), comes at cooperative purchasing from the side of a smaller institution. West has a purchasing department of three and looks to cooperative groups such as U.S. Communities to provide solutions upon which they can rely.

Connie Kuranko, Director of the U.S. Communities Going Green Program, comments on how her team is helping participants to find environmentally preferable products and services while taking advantage of volume discount pricing and eliminating the expense to go out to bid.

"From EcoLogo to Green Seal to Energy Star, U.S. Communities' Going Green Program has identified items in its contracts that meet third-party environmental certification and meet participants responsible procurement needs," says Kuranko.

Substituting for Green
As part of overall sustainability goals, universities and colleges are seeing green procurement programs cropping up on campuses across the United States. These institutions have diversified needs and varying degrees of sensitivity when it comes to switching to more sustainable products and services.

To meet this growing need, Office Depot developed the Green Substitution Program, along with support from U.S. Communities and Los Angeles County, to offer "greener" office supplies to clients.

"The Green Substitution Program is a tool that allows customers to search for environmentally preferable items online," says Chris Penny, Director for the Public Sector and U.S. Communities at Office Depot.

"The success the Green Substitution Program has had is due in large part to having listened to our customers." Phil Charneskie would have to agree. Charneskie is Director of Purchasing, Contracts & Payment Services at West Virginia University and has been working with

For more information about U.S. Communities see the interactive brochure at www.naepnet.org/uscommunities
Office Depot for approximately five years. Charneskie has been pushing for online technologies that help drive greener purchasing, and the Green Substitution Program is fitting the bill. "Through our U.S. Communities contract, West Virginia University is able to order supplies online such as recycled ink cartridges and remanufactured toners from Office Depot for departments all across campus," says Charneskie. "The ability to search for green products online has been terrific."

Practicing Responsible Purchasing

Whether it is the Going Green Program or the Green Substitution Program, higher education institutions have access to a number of valuable resources that promote environmental purchasing. Best practices are an invaluable resource, and higher education purchasing professionals have shared some of their methods for achieving excellence below:

- Relationships are important – Southern Methodist University out of Dallas, TX, finds the established contracts that U.S. Communities has with qualified contractors such as Office Depot, The Home Depot and HD Supply Facilities reliable and capable of meeting their varied needs.

- Work with other institutions to get the best price – With the help of Office Depot, West Virginia University uses a purchasing card that is attached to the LA County/U.S. Communities office supply contract, providing them with deeper discounts.

- Mandates open purchasing doors – Having the President's backing is extremely important. "Make the right choice available to staff members," says Charneskie. "If central mandates exist, staff can then follow the outlined purchasing policies, and change would be made at a much faster pace."

U.S. Communities understands how essential it is for procurement to deliver on the promise of Supplier Diversity and is committed to continuing to bring diversity purchasing solutions as part of our commitment to responsible purchasing to your community," says Kuranko.

Sustainable Solutions Found

Sharing tools and responsible purchasing practices is helping to move universities and colleges toward greater sustainability. When higher education institutions use diversity as part of their purchasing mix, they are finding innovative solutions to their supplier needs. With many institutions looking to purchase responsibly, there has never been a more convenient time to be cooperative.

For more information about U.S. Communities see the interactive brochure at www.naepnet.org/uscommunities
The journey from the NAEP Annual Conference in San Jose to the Annual Conference in Austin proved to be a grueling and bittersweet adventure for five women, now known as the Musketeers, who strived to become Certified Purchasing Managers (C.P.M.s). The miles between annual meetings were seemingly paved with blood, sweat and tears of joy, while their mentor, Bob Ashby (now known affectionately as TBB, or Trail Boss Bob), led the way and the Musketeers followed closely behind.

In each of their personal experiences, you will find amazing similarities and vast differences as the Musketeers individually describe how they worked together to reach their professional goal. The common thread and most important component in this group has been their unity, support, compassion and the unwavering respect that they have found in each other. This collaborative adventure has taken the Musketeers from a one day C.P.M. Exam Workshop in San Jose to a lifelong commitment of friendship and support for each other, and more recently to the podium in Austin where they were recognized for their achievement and dedication to the study group whose motto was—and is—“All for One and One for All.”

“No two folks are alike—but, again, the ones who succeed are the ones who do this process together.” Bob Ashby

Mary Bacci, C.P.M., MIT, Massachusetts:
Who knew when I joined the Purchasing Department at MIT in 1986 that I would actually love it and stick with it? I certainly didn’t. This was a stepping stone, or so I thought. That stepping stone has grown into a career in a field I never sought out. But I am so glad it found me.

I was made aware of certification early on in my career; however I never really took it seriously. After 10 years working at MIT in Purchasing and learning about this field, I wanted to expand my knowledge and learn as much about purchasing as possible. Although at that time I was not ready to dive into the certification process, I did attend courses and seminars to expand on what I already knew.

I believe that timing is everything and when you are ready, time and opportunity appear. In 1999 I became more involved in negotiating contracts, managing people and leading teams to establish e-commerce partnerships for the Institute. This transition from “buying” to managing really provided me the opportunity to take a look at my career path. Where did I want to go in Purchasing? What is the next logical step? It was to obtain my professional certification.

Partly because the amount of information that I needed to absorb was great, I decided to take one module at a time. I attended C.P.M. review classes offered by ISM and decided to test on Module II first. I took the test a few days after the review class and passed. I’d love to say that I stayed on course and proceeded at a fast pace, but life events take priority and some time passed before I decided to work diligently to achieve my goal.

It wasn’t until I began attending the NAEP Annual Conferences on a regular basis that I really decided to follow through and finish the remaining three Modules. I took the review classes offered at the Annual Conferences in Salt Lake City, Baltimore and San Jose. The review classes were instrumental in my success. Module 4 seemed to be the most difficult task for me and although I had to take the Module 4 test more than once, I was determined to finish. During the review classes in San Jose I met a wonderful group of women, the most amazing 5 women I have ever met.

We shared our difficulties, some study tips, our successes and our failures. We vowed to exchange e-mails to let each other know the results of our tests. It took 4-6 long, grueling weeks to obtain our test results since we had taken written, not computer tests. When the results came in, again I did not pass. Needless to say I was disheartened. I sent an e-mail to the group, told them that I did not pass and that I was ready to throw in the towel. I felt that I could not absorb anymore of the material and that I was not destined to get to the finish line. These women rallied around me and would not let me give up on myself. We banded together and asked Bob Ashby if he would help us all pass by forming an on-line
study group. He agreed and proceeded to provide us with sound advice, helpful test-taking tips, and sample exam questions. Without the support of this group, now dubbed The Musketeers, I'm not sure that I would have reached my goal.

I passed my final Module in August 2007. My Original Lifetime C.P.M. Certificate is framed and hanging proudly in my office. The group is still working together to pay it forward and help others achieve their goals.

"You may be disappointed if you fail, but you are doomed if you don't try." Beverly Sills

Kathy Crilly, C.P.M., A.P.P., Soka University, California:

My decision to pursue my C.P.M. certification began in early 2004. My plan was to start taking local workshops through ISM, starting with Module I and continuing with consecutive modules and tests thereafter. I scheduled the Module I test for the week after attending the first workshop. There was on that first day with my brand new study guide expecting this workshop to teach me EVERYTHING I needed to know to pass the test. Unfortunately, this was a review workshop and the people attending had already read the study guide and were ready to truly review the material and take the test. I was not one of these people; I never opened my study guide before I attended class and had no idea what the instructor was reviewing. Needless to say, I failed Module I with flying colors.

I knew I had to take a different approach in preparing for my tests so I started an online purchasing certification program through California State University Dominquez Hills. In January 2005 I passed Module I and in July 2005 I passed Module II. I finished my program in the fall of 2006 and took Module III and IV tests a couple of times and failed. During this time I also attended the NAEP Annual Conferences in various locations and met Bob Ashby through the workshops that were offered. I was still struggling with passing Modules III and IV and was becoming so discouraged that for awhile I even put my books away and quit.

I was encouraged to attend the San Jose Conference in March of 2007, to re-take the workshop and test once again. I registered for both Module III and IV tests at the conference. The workshop was conducted by David Buck and in the class were 5 other women who were experiencing the same frustrations that I was. A few of us tested the next day and some of us passed, some did not. What materialized from that day was an unshakable bond between what is now known as the Musketeers. Bob continued to support our endeavors to become C.P.M.s by creating an on-line tutoring class to accommodate the miles between all of us until each and every one of us had those three beautiful letters after our names.

In November 2007 I passed Module IV and received my C.P.M. certification. Shortly after, I was promoted to Director of Purchasing, I, along with Bob and my fellow Musketeers, have been “paying it forward” to each new Musketeer who has ventured on the journey to certification.

"If you fail, try again; never give up on your dream; and always pay it forward!" Kathy Crilly

Bette Gilliland, C.P.M., A.P.P., Kenai Peninsula Borough School District, Alaska:

My journey to C.P.M. certification began at a conference in 1998 in Anchorage, Alaska, two years after I began my purchasing career. I came into purchasing like a lot of others, a job was open and I was there to fill the spot. I really enjoyed the work and I realized early on that I needed to further my knowledge of this field, so when I heard about the certification offered through ISM, I knew that this was something I should pursue. It took me a couple of years to take the challenge and immediately found that self-study is not all it’s cracked up to be. I continually searched for people I could glean information from regarding the tests and the material covered, but was not able to find a study group I could connect with for Module I. I took my first test in 2003 and failed with a score of 53. Needless to say, I was not a happy camper and my husband refused to go with me for the next two test dates in fear of me failing again. Failure does not set well with me as I am sure everyone can identify with. But once I got over being mad, I got back to the books, got serious and passed Module I in 2004. I found a study group for Module 2 within the ISM-Alaska group and it proved to be immensely helpful, enabling me to pass Module 2 in early 2005. Unfortunately, the study group faltered and was never resurrected, so I was back on my own again for Module 3.

Building a new home got in the way of studying and I didn’t pursue Module 3 until 2006, passing that test in early 2007. About a month before I was headed to San Jose to attend the 87th Annual Conference I decided to register for the Modules 3 and 4 study sessions and to take the Module 4 test. I figured at least I would at least get an idea of what I needed to study if I failed. I started studying in the morning before work and in the evening, every single day. I crammed!

The most profound result of that decision to test and attend the Study Group for Modules 3 and 4, besides earning my C.P.M. certification, was meeting a group of awesome women and Bob Ashby, who became our mentor and teacher. The women were all on their own road to certification and we were all there for the same reason - to learn. Bob was there to teach. The stars were aligned and the Musketeers were born (again).

David Buck was the instructor for our study group and he must be a great teacher since I passed Module 4 in San Jose, one month after I passed Module 3. YES!! Studying with a group again made a huge difference! Even though I passed Module 4 in San Jose, I felt a strong connection to this group of hardworking people and was humbled by their dedication and perseverance. I can’t say that I made any significant impact on any of these women but they sure made an impact on me. What I have found was that when a group of individuals join together to achieve a common goal the results are phenomenal. The study group that we formed allowed us all to the find answers to our questions and gain understanding in areas that we were finding difficult.

The biggest lesson I learned through this process was that the only thing that kept me from obtaining my professional certification was me. Failing Module 1 brought that right home and I used that energy that I felt from failure and turned it into a focus to pass. I took every chance I could to pick people’s brains about these tests, asking anyone and everyone for advice and knowledge. The study group was the biggest help by far and I would encourage all who are seeking to obtain their certification to find like-minded people and work together and dare to fail for without the trying there can never be success.

As of today, I have the A.P.P. and C.P.M. designations after my name and have been recently promoted within the Kenai Peninsula Borough School District Purchasing Department. The road to certification has given me confidence in my job, has resulted in a promotion, and has made me some very wonderful friends.

Katya Rodriguez, C.P.M., UCLA, California:

I went to the NAEP Annual Conference in San Jose in March 2007 and attended Bob Ashby’s one day class on how to pass the Modules 1 & 2 exams. It was very inspiring to me to have someone help me understand ISM’s evaluation process and methodology. Bob offered to help those in the class with Modules 3 & 4 once we passed Module 1 & 2.
I passed Module 1 & 2 and immediately contacted him for the promised help with Modules 3 and 4. He told me about a group of ladies he was helping pass Module 4 and asked if I wanted to join this group and, if so, after I passed Module 4 they would help me study for the Module 3 exam.

I joined the study group team and met Kathy Crilly, Mary Bacci, Bette Gilliland and Paula Taylor, the Musketeers. We started studying together as a real online study group. This was a great experience being able to interact with people from Alaska, Massachusetts, three cities in Southern California, and our coach Bob from Las Vegas.

Everyone was very supportive and patient. We all helped each other. After I passed Module 4, I started preparing to take the Module 3 test. Even though most of the rest of the group was done with their tests, they kept helping me study, clarifying questions and cheering for me.

After I passed my tests all the members of the team called “The Musketeers” agreed to meet at the Annual Conference in Austin. It was exciting to be planning on meeting after almost a year of working together. Bob and Andrea Alexander, C.P.M., one of our cheerleaders, kept us informed of new people studying for their C.P.M.s, many because of the Musketeers’ creed to “pass it forward” by helping others. Suddenly we had this big group of people working all over the US on their certification.

When I think about the Musketeers team members I identify one word with each member:

- Bob—mentor
- Andee—support
- Kathy—friendship
- Bette—dedication
- Mary—laughs
- Paula—fan!

I am so grateful to be part of the Musketeers team and to be a C.P.M.

Paula Taylor, C.P.M.,
University of Maine System:

My contribution to this article would have read quite differently over a year ago. I finally received my C.P.M. certification on Valentine’s Day of 2008 after a couple years of stopping and starting this endeavor alone. I could tell you my story of trials, tribulations, and what it was like to “go it alone” for so long without any support or mentor, but I won’t. What is important to me now is that I convey to anyone who will listen how fortunate I have become professionally and personally by agreeing in San Jose to ban together with this energetic and dedicated group of Musketeers and Mentor, Bob Ashby.

Today, the challenge of obtaining “the three little letters” to add behind my name is over and the importance of the certification has since lessened. That is not to say that the certification is now not important to me, but merely when I finally reached my goal and obtained the designation, I then realized that I had gained so much more than the C.P.M.

More importantly than the book knowledge and experiences that I learned during the certification process are the Musketeers and the many others that I have met along the way that I can now both draw upon and give back to. Some of us literally were worried near the end of Module IV, because it meant that our regular day to day contact with each other might soon cease and we even joked over ideas of what hobbies we might take up together to fill this camaraderie void. So, given our familiar and collective mindset we decided to continue to “pass it forward” and have since each joined in smaller sub-groups to keep the positive energy flowing toward the final finish for others. Always, all for one and one for all!

In the meantime, we Musketeers have used e-mail, phone, and text messaging to stay in touch. And believe it or not, a few of us even met up just for fun in California last winter to personally say congratulations and job well done! We still connect regularly and talk of mentoring, RFQ’s, staffing, contracts, committees, cheering leading, vacations, and what we might wear to the next regional meeting’s evening event. Together we have taken the power of networking to another level and I am very proud to be a member of this group!

In summary, the Musketeers succeeded by sticking together. We are still going strong and helping others in their quest to obtain a professional certification. Our study group didn’t disband after Austin; it has grown with new people joining the group and working to obtain their certification, too. The Musketeers have a motto in the movies as well as in our group, “All for One and One for All.” This motto isn’t just a group of words; it is what we stand for. We who have passed and earned our certification have now been “Passing it Forward”; helping the new Musketeers gain their certification. Our advice to all those wishing to become professionally certified in our chosen profession is to get off that fence and get going; there is a group of people just waiting to help you along the way. Feel free to contact any of the Musketeers or find a group of people already in the process of studying and join together. The results will astound you.
Evolution or Revolution

Editor's Note: We have started a new department for the NAEP Journal entitled, "Evolution or Revolution," where we will highlight new ideas regarding Educational Procurement. By "Evolution" we mean new ways of handling old ideas. By "Revolution" we mean a completely new idea, concept or method that could result in additional benefits for your institution. We are interested in new and better ways to do our jobs in meeting the needs at our institutions. We leave it up to you, the readers, to decide which is which, Evolution or Revolution, when articles are published.

As a member of the Journal's Editorial Committee, I sent out a message to the NAEP listserv asking for "evolution" or "revolution" ideas from our Members. A number of good responses were received that I trust will whet your appetite for future columns, which are shared below.

Jeff Bromberek
Jeff Bromberek from DePaul University told me about several things they are doing. Procurement Services is partnering closely with their Advancement Office & Athletics Office to incorporate sponsorship agreements into most of their vendor agreements. These agreements include athletic advertising, classroom naming rights, scholarship funds, and event sponsorships. They also have an in-house auction website for salvage goods. They are converting it into a store that will open soon. Also, Procurement Services maintains a personal discounts website for the university community for discounts available from their vendor base.

Vicki Niese
Vicki Niese from Ohio Northern University mentions that they are thinking of using an outside firm for reverse auctions. The firm will help write the bids and then run the auctions for them.

Don Krech
Don Krech, Director of Procurement Services at Bucknell University, says his school is trying to increase interaction campus-wide between students and departments. It would normally be difficult for any interaction to occur with Procurement Services, so they have had to find ways to cause this to happen. The department has become directly involved with various sustainability and greening issues that have been initiated by the students. Don has become an active member of their Environmental Sustainability Committee and assisted with specifying and purchasing solar panels.

Don is also one of several staff members who lead students on a special Spring Break trip. It is called "Civil Rights: The Unfinished Journey," and it explores Memphis, Little Rock and the University of Mississippi. Those are a couple of good ideas about how to increase the profile of Procurement on your campus.

Marty Newman
Marty Newman from the University of Maryland – College Park mentioned several changes they have made recently. Here they are:

- Using document imaging (scanning) to reduce paper usage and free up storage space.
- Sending out RFQs, and receiving responses, via e-mail instead of snail mail or fax.
- Placing purchase order and contract terms and conditions on their website and pointing vendors to the website, instead of sending them with each purchase order and contract.
- Using electronic requisitions and purchase orders.
- Doing conference calls instead of face-to-face meetings.
- Use of purchasing cards for delegated, non-compete transactions.

Steven Saposnik
According to Steven Saposnik, Purchasing Coordinator at Florida Atlantic University, they have also begun to use document imaging. Using desktop scanners, they scan each purchase order and accompanying backup paperwork as well as create a pdf file. If someone requires a copy of a purchase order, the employee can just print one off of the shared drive. They can also use the scanners to e-mail purchase orders to their vendors. It's a process, Steve notes, that has saved a lot of time and effort.
Stan Behnken

Of course, there are some of us who may be de-voing instead of evolving. Stan Behnken from Anne Arundel Community College in Maryland states that they have gone back to using only pencils, carbon paper and paper as part of their green initiative. He felt that computers were causing them to use too much paper. (What did happen to the paperless offices we were supposed to have once computers became widely used?)

Stan was joking, of course, but sometimes new technology and change can seem scary or overwhelming. It is absolutely necessary, however, if we want our departments, and our institutions to move forward.

John Klopp

Access Control Systems have become increasingly important, especially in light of recent events at several campuses. John Klopp of the University of Iowa noted their institution felt the system was so important that they first qualified Access Control System Manufacturers, selected “acceptable alternate” manufacturers and ultimately selected a manufacturer’s certified/licensed integrator which the university used to standardize its Access Control Systems. John presented a session about the competitive processes used for this project at this year’s Annual Meeting in Austin.

Paula Taylor

Since purchasing cards are now widely used, some institutions have encountered problems – not having adequate resources in their Internal Audit Departments to conduct reviews of their purchasing card programs. Paula Taylor of the University of Maine System says they have come up with a procedure to support policies, promote communication, complement training, ensure control compliance and increase the visibility of their P-card program. Paula presented a session on this topic at a P-Cards on Campus conference recently.

There you go. Those are a number of ideas presented to me by your peers, which could help you improve your presence on your campuses. We will be fleshing out some of these ideas in future issues of the Journal. There are plans for full articles about some of the topics mentioned above, as well.

Remember, we need to hear about what you are doing at your institutions that could be causing the next “Evolution or Revolution.” Feel free to contact Mike at mchmielewski@lsac.org with any ideas.
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